



Retention Policy

This policy lets you know how long we keep your information, how we store it and how we dispose of it.

1. Client records

All client contracts, consent forms, client detail forms, and emails containing discussion notes that would contribute to your products and services, complaints, and SARs are retained for a period of 7 years* from the end of the last engagement to comply with both tax law and insurance purposes. Information is stored in cloud providers Dropbox, Google workspace and Wix website analytics and will be *electronically deleted.

2. Coaching client notes

During sessions minimal client notes are taken, such as key words, small sentences or references to client reflections. These handwritten notes are not retained post session. They have no reference to names or any identifiable data and are shredded immediately post-session. Overall goals, set generic homework tasks and key progress will be recorded electronically, stored in word documents in Dropbox and electronically destroyed with all client data 7 years from last engagement.

3. Reiki health forms

These forms are stored electronically in Dropbox and deleted after 7 years from the last engagement. This complies with insurance and Reiki Federation expectations.

4. Video recordings for professional qualifications

Infrequently, the coach will need to submit a recorded session as part of their case studies for qualification and accreditation purposes. If you are approached to have a session recorded, the coach will explain the purposes for the recording and gain your written consent. You will be a volunteer for the recording, if you chose not to volunteer for recording this is perfectly fine, it is not an expectation of your client contract.

The volunteer consent form will be stored electronically for a period of 7 years (as related to section 1 above). All volunteer recordings will be retained by the coach only for the period of time to gain approval for qualification or accreditation, typically a maximum of 3 months, any variance to this will be shared with the client.

The volunteer will be informed and confirmed in the consent form, how the receiving Accreditation Body will process your recording. Typically they assess the recording and retain for as long as required for audit purposes.

Feedback forms

Client feedback is optional and obtained via Google forms. Googleforms will be deleted 7 years from completion, but anonymised feedback may be retained for the purposes of scored reviews (1-5 stars). Any pre-agreed marketing statements will be retained for as long as the statements are used in marketing materials.

Questions?

If you have any questions, concerns or complaint about the use of your personal data, you can make an enquiry to

Alison Cook at info@consciousmeraki.co.uk.

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

The ICO's address:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>

Alison Cook
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